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**DCSS P3 PROJECT  
CLIENT ACCESS WORKGROUP  
AUGUST 16, 2000 MEETING  
MEETING SUMMARY**

**A. GENERAL**

On Wednesday, August 16, 2000, the California Department of Child Support Services (DCSS) Policies, Procedures, and Practices (P3) Project, Client Access Workgroup held its second official session in Sacramento. The following members attended:

- ☒ Bill Kirk, State Co-Leader (DCSS Supervisor)
- ☒ Corilynn Breitwisch, County Co-Leader (DIC Call Center---Los Angeles)
- ☒ Lucila Rolon, State Analyst (DCSS Analyst)
- ☒ Robert Bash, County Analyst (Manager---Tulare)
- ☒ Faye Thomas, Small County Rep (Director---Amador)
- ☒ Dianne Seno, Medium County Rep (Supervisor---Ventura)
- ☒ David Norwood, Large County Rep (Supervisor---San Diego)
- ☒ Rumyana Tasser, Advocate (ACES Leader)
- ☒ Betty Nordwind, Advocate (Executive Director---Harriett Buhai Center)
- ☒ Connie Jimenez, Judicial Council Rep (Facilitator---Santa Clara)
- ☐ Ron Dotta, FTB Rep (CAMP)
- ☒ Sandy Trigg, FTB Rep (CCSAS Information Systems Analyst)
- ☐ Ed Kent, FTB Rep (CCSAS Child Support Specialist)
- ☐ Judi Bentzen, FTB Rep (CCSAS Child Support Specialist)
- ☒ Renee Bastien, CSAC Rep (CMO Analyst---San Bernadino)

Attending *ex officio* were:

- ☒ Julie Hopkins, Facilitator (SRA International)
- ☐ Pat Pianko, Resource (OCSE---Region 9)
- ☐ John Schambre, Resource (OCSE---Region 9)

This meeting summary highlights points covered, material discussed, decisions made, and follow-up tasks for forthcoming sessions. Comments and corrections should be addressed to Julie Hopkins at [julie.hopkins@dss.ca.gov](mailto:julie.hopkins@dss.ca.gov).

TRAVEL CLAIMS: Michael Coleman visited the group to discuss travel reimbursement. He pointed out a new basket for travel claims. He explained that flights should be booked through state process and that if you booked your own flights you may be subject to state limits. Flight Reservation Request forms were provided. Reimbursement forms were e-mailed Monday; all that is needed is to type in your name and address plus costs. An original and three copies should be mailed to their department. Use address on electronic form. They do have a preference of blue ink for an original signature. It should take approximately two weeks to receive payment. You may pick up your checks if you desire.

Overnight stays. Sacramento has a maximum \$84.00 plus tax for lodging.

## **B. REVIEW OF LAST MEETING'S MINUTES**

Corry began the meeting with a review of the minutes from the last meeting, and some discussion of an e-mail received from the Performance Measures Workgroup. They would like information from Client Access regarding measurements of customer service delivery. Julie suggested that perhaps we could add a section to our matrix that would supply prospective measurements. Corry requested that the group email suggestions to Cory by this Friday and she will compile and email back to us by Monday and then forward suggestions to that committee for their meeting on August 23, 2000.

Robert Bash indicated there was a correction to the prior minutes in that he was assigned to review the notes from the other groups as to matters relative to our group and not David.

## **C. TODAY'S TENTATIVE AGENDA**

- Complete definitions of access and outreach
- Review/approve survey instruments
- Develop matrix identifying access methods/measurements
  - Survey existing methods
  - Examine our ideal
  - Best practices search
  - Think big . . . visualize statewide

## **D. RESEARCH AND INFORMATION REPORTING**

Robert Bash reported out on the notes he had reviewed from other workgroup meetings. Call outs were discussed, having an automated system to telephone clients to advise them of items such as court dates, etc. Forms Workgroup discussed having forms at a sixth grade reading level. Our committee discussion on forms and their explanation was noted. The Training Workgroup has split up into several categories – one of their two tracks is going to be an outreach model. Management Practices Workgroup was looking at internal needs between local and state agencies and flow of information, perhaps a statewide e-mail system. They also talked about the role of regional directors and local directors as to information sharing. Fair Hearings Workgroup was looking at complaints in general and Internet possibilities, as well as the fair hearings process as a whole. They asked if there were any other parties other than custodial and non-custodial parents, i.e., grandparents, as customers. Case Worker Staffing group – looking for definition of case worker vs. customer service worker and if there is a difference between the two.

Lucila distributed a list of Client Access Best Practices she was able to gather from several states. Renee attended a meeting of the Public Outreach Committee and distributed notes as to some of their best practices.

**FTB CALL CENTER TOUR:** Those attending plan to meet at the facility in Rancho Cordova at approximately 1:45 p.m. on Tuesday, August 25, 2000. Sandy will e-mail the group with the address and directions.

## **E. REVIEW AND APPROVE SURVEY INSTRUMENTS**

We are planning to do three surveys: 1) the IV-D community; 2) the Judicial community; and 3) child support customers. The group reviewed two draft surveys. Julie provided information on obtaining approval for surveys from the P3 Leadership. All survey responses must be sent back to a DCSS group member. Lucila volunteered to receive and tabulate responses.

**IV-D Community Survey:** Robert incorporated some of the suggestions Bill made and other suggestions made by the group and provided a copy of the proposed survey of the Client Access P3 Workgroup survey to each member of the group. The survey form was approved by the group. There was some discussion of deadlines; Julie thought the August 25<sup>th</sup> deadline would be okay if the form were approved quickly.

**Judicial Community Survey:** Betty Nordwind provided copies of a memo regarding this survey, the survey form and cover letter. She proposed to mail the survey to several organizations:

- 1) California State Bar Client Trust Fund and Equal Access Fund Programs
- 2) Family Law Facilitator Offices
- 3) Other agencies and individuals maintained through the California Judicial Council Family Law Advisory Committee mailing list
- 4) Officers of the State Bar Family Law and the LA County Bar Family Law Sections
- 5) Members of the LA County Family Support Advisory Board
- 6) Rosenberg Foundation child support grantees
- 7) LA County Family Law Judiciary

There was a great deal of discussion of this survey. Some thought that the audience may be too broad, and that perhaps we should use the survey as part of our recommendation to the DCSS, i.e., DCSS should conduct this survey at a later date. Bill said there had been internal discussion in the Department as to possible surveys statewide and thought we may want to consider some realistic boundaries as to what we can accomplish with our limited timeframes and capabilities and instead look to what the DCSS can take on as a future project.

Discussion was held as to whether we move forward with this survey as a group or suggest it be referred to DCSS for future use. Robert suggested both. Thought this survey was good for views other than internal. Corry had a concern that the view may be slanted as to LA County views and was that really the view we were interested in having. Betty said that LA County family law judiciary could be eliminated because it would be covered by State Judicial Council and in general make it more geared to statewide. Connie suggested the

Commissioners be added. Betty said the Judicial Council would be the best way to reach judges.

The group agreed that the survey should go forward, with a modified target mailing list. The survey would go to the following:

- 1) California State Bar Client Trust Fund and Equal Access Fund Programs
- 2) Family Law Facilitator Offices
- 3) Other agencies and individuals maintained through the California Judicial Council Family Law Advisory Committee mailing list
- 4) Officers of the State Bar Family Law
- 5) Rosenberg Foundation child support grantees

The group would also include in its recommendations to DCSS that a full survey of the judicial community be conducted.

**Child Support Customer Survey:** Rумыana indicated she was also working on a survey for customers of the ACES group and other advocacy groups.

David suggested we might use the same survey for advocacy groups. Rумыana will review and get back to group as to that aspect. Bill thought for our purposes here this one survey would satisfy the needs of all groups. It was suggested that ACES might want to add some questions to this survey.

During a break Rумыana faxed the Advocacy Committee, and received a list of questions that they would like to see incorporated into a survey. The Advocacy Committee felt their questions should be added to the survey that Betty suggested. It was noted that most questions were open-ended and that it would be better to present as statements that would require yes or no answers for ease in tabulation. The group will email suggested changes to Rумыana by August 23, 2000.

## **F. CLIENT ACCESS MATRIX**

Cory reviewed four areas of client categories outlined at prior meeting:

- **Government**
  - Federal
  - State
  - County
  - Elected Officials
  - FTB
  - OCSE
  - Other government agencies
  - Other counties; FSD
  - Other government agencies; DSS
- **Case Members**

- CPs
- NCPs
- Attorneys of Record (w/ a right and need to know)
- **Employers, Financial Institutions and Other Payors**
- **Other/Third Parties**
  - Advocacy Groups
  - Elected Officials in Advocacy Roles
  - General Public
  - Freedom of Information Act requests

The group then began review and discussion of the Client Access Matrix, which incorporated the identified customers above, and the various access methods the group had brainstormed in the previous session. There was some discussion as to whether the Matrix should identify minimal, i.e., mandatory, standards, or ideal standards that the DCSS and counties should develop over time. We decided to identify both, as well as the purpose of the access, either educational or case access.

We then moved through the matrix to, identify minimal and ideal client access standards, as well as the purpose for which each customer would be obtaining access. The completed matrix is attached.

## **G. CROSS-WORKGROUP ISSUES**

Reported out in Section D of these minutes.

## **H. SYSTEM REQUIREMENTS**

None identified.

## **I. HANDOUTS**

- California Department of Child Support Services Program Update, August 2000
- Client Access Best Practices
- California Child Support Council Public Outreach Committee Notes, July Quarterly Meeting
- BCSE Call Center Diagram
- Draft Client Access P3 Workgroup Survey
- Draft Child Support Client Access Survey
- Draft Client Access Matrix
- Draft ACES Survey Questions

## **J. ACTION ITEMS/HOMEWORK ASSIGNMENTS FOR NEXT SESSION**

- See attached listing.

## **K. ANCILLARY (PARKING LOT) ISSUES**

None identified.

## **L. ATTACHMENTS**

- Action Item List
- Client Access Matrix

## **M. TENTATIVE AGENDA FOR SESSION TWO**

- Complete matrix identifying access methods/measurements
  - Survey existing methods
  - Examine our ideal
  - Best practices search
  - Think big . . . visualize statewide
- Develop priorities with respect to different customers
- Develop recommendations for the “ideal” model